

# **A Guide to Managing Successful Volunteer Programs**

Produced by the



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*"How wonderful it is that nobody need wait a single moment before starting to improve the world."*

*Anne Frank*

## INTRODUCTION

Throughout Illinois, volunteers are building and improving communities by meeting unmet needs. We commend you for your interest in creating a volunteer program or making an existing program even more effective.

The material in this packet will give you an overview of the elements of good volunteer program management. It includes chapters on planning and organizing a volunteer program, creating your vision and mission as well as policies and procedures; creating volunteer jobs and position descriptions; recruitment; screening, interviewing and placement; orientation and training; supervision; evaluation; recognition and retention.

In volunteer management, each element connects to the rest. As you read the manual, you will see why retention is directly related to good job development, screening and placement; how evaluation is connected to supervision; or mission and vision to the whole. Without one piece, the others lose their effectiveness. So reading each chapter is crucial.

An extensive resource list has been included as well. Consult it for the names of highly regarded books and organizations that can help you. Many organizations also hold annual conferences and workshops on volunteer management and volunteerism. For more information, please contact the Illinois Commission on Volunteerism and Community Service.

*“Our nation will succeed or fail to the degree that all of us – citizens and businesses alike – are active participants in building strong, sustainable and enriching communities.”*  
*Arnold Hiatt, President, The Stride Rite Foundation*

## **I. PLANNING FOR THE VOLUNTEER PROGRAM:** **VISION/MISSION/POLICIES and PROCEDURES**

Too often, a volunteer program begins with the plan of finding volunteers to get a job done, followed by recruitment of volunteers. Actually, position development and recruitment are the third and fourth steps in the process. To start with recruitment may net initial rewards, but ultimately will stymie the agency's goals and the hope of a long-term, well-integrated volunteer program that can fill many needs within the organization.

Instead, begin by planning and organizing, developing a climate of agency receptivity and creating a vision and mission for the program. Finally, develop policies and procedures to reduce risk, ensure smooth systems and clear organization. When that's complete, recruitment can begin.

For a volunteer program to be successful, it must be a partnership between the paid and unpaid staff. Paid staff must see the volunteers as helping them meet their goals and must feel rewarded for supervising and involving volunteers. Involve staff in creating, then articulating, the purpose of the volunteer program, its vision and mission.

Ask staff why volunteers are needed or wanted. What value would be added by developing a volunteer program? What benefits – to the clients/public, agency, or community – would result from a successful volunteer program? How could volunteers expand services and help staff? What could the agency as a whole accomplish if it had a volunteer corps?

The reasons for developing a volunteer program may be many and multi-faceted. Some typical answers include: expanding resources by gaining practical assistance with specific, needed jobs; utilizing skills that staff don't and won't have; enhancing public relations by developing community emissaries; creating support for clients that is non-threatening; building external support for the cause and invigorating paid staff.

Once volunteer program managers, other staff and their bosses understand why they want volunteers, they are ready to begin creating a vision and mission for the volunteer program. Just as the agency has a vision and mission, so should the volunteer program. The statements should mirror the organization's, show how the volunteer program supports the agency's vision and mission and use the same format. The process should include staff, directors and board members.

Creating vision and mission is not fluff. How else will staff, board and volunteers understand the purpose of volunteerism at the agency and the value added by a volunteer program? What else could be better utilized to motivate and inspire staff and volunteers?

There are many differing opinions, and no right answer, as to what vision and mission statements are and how they should read. Most agree that the vision should encompass the future ideal. Some believe it should be a detailed picture. Others say it is a short, meaningful, easily remembered statement. In either case, it should tell of the better world created after the agency and volunteer program accomplish their goals.

There is similar disagreement on the format and purpose of the mission. Some say a mission should state the ultimate goal of the agency or volunteer program. For example, to wipe out illiteracy or hunger. Others say that is the role of the vision while the mission statement describes the business of the agency or volunteer program and how it will achieve the vision. Volunteer program managers should look at their organization's vision and mission and create similarly styled statements for their programs.

After the vision and mission are developed, the structure of the program must be decided. There are three basic structures for a volunteer program: centralized, decentralized and combination. The centralized program often occurs in smaller agencies where staff support is highly limited. In this design, volunteer coordinators, directors or program managers directly train and supervise the volunteers as well as screen them and provide recognition and retention strategies. This structure is appealing to many program managers who want direct contact with and control over volunteers.

The centralized model can, however, be limiting. One person can effectively supervise only a limited number of volunteers during a limited number of hours. So the centralized system works better for event-oriented volunteer programs, small programs in which the services occur only during certain hours or programs that don't need on-site, ongoing supervision.

A decentralized program requires agency staff to train and supervise volunteers. The volunteer program manager still screens and orients, handles issues, conflict resolution and new program development, but acts more as a human resource generalist, leaving the "experts" – program staff working in a particular area – to supervise.

This system allows for endless expansion of the volunteer program if there are staff willing to train and supervise. It should provide better training for volunteers, which reduces risk. For the volunteer program manager, the challenge then becomes working with staff, helping them become effective supervisors by educating them on volunteer issues and motivation. Volunteer program managers also lose control in this structure as they are reliant on good supervision to maintain a quality volunteer program.

Once the structure is created, it's time to create policies and procedures. Policies can reduce risk, ensure smooth systems and clear organization. They steer the program, reflect the agency's values and are the guiding principles and parameters that influence action. While too many policies are ineffective, making the program feel over-regulated, too few will make the program vulnerable with important issues left unaddressed.

Policies are fluid documents that should be reviewed annually and revised when necessary. The volunteer program's policies should be specific and mirror the organization-wide and human

resources policies. For example, if the agency has a confidentiality policy, the volunteer program should too and it should mimic the organization's as a whole. Some typical areas for policy development include, but are not limited to:

- Liability issues and insurance
- Confidentiality
- Probation period
- Reasons for termination or discipline
- Grievance procedures
- Equal employment/non-discrimination
- Benefits
- Timesheets/sign-in
- Notification of absence
- Dress code
- Criminal background check
- Screening process
- Training and orientation requirements
- Evaluation/Assessment
- Visitors
- Use of equipment

*"No one is useless in this world who lightens the burden of it for someone else."  
Benjamin Franklin*

## **II. CREATING VOLUNTEER JOBS and POSITION DESCRIPTIONS**

As our society moves at an ever-faster pace, and free time becomes more and more limited, volunteers' need for meaningful, challenging work increases as well. Like the rest of us, volunteers have little available time and too many demands.

In order to recruit and retain valuable volunteer resources, the jobs that volunteer program managers design must be interesting, rewarding positions that utilize skills and interests. These jobs and the work volunteers do in them are the product of the volunteer program. To be meaningful, these assignments must meet the needs of the organization, but contain the added element of meeting the needs of the volunteer spending his or her free time working without financial recompense.

Developing jobs people want to do is one of the most important aspects of volunteer program management. Let's face it. Volunteers are not being paid. Their motivation is fundamentally different than paid staff's. They have many options for their free time. The only reason they will continue to volunteer is if they are doing something they want to do and that they feel is needed.

The job of the volunteer program manager is to educate staff as to what kinds of volunteer positions they can realistically fill. For example, staff's greatest need might be daily filing of reports, but it can be a tough sell to volunteers, most of whom want challenging work, if they feel they can make a more meaningful contribution. If the volunteer program manager understands staff needs and can work with staff to help them better understand the needs of the volunteer, the organization reaps huge benefits.

Whether your program is centralized or decentralized, the first step in creating productive, important volunteer positions is finding out what staff perceives are its volunteer needs. No volunteer job is meaningful if it is not needed. While these meetings will probably be a process of relationship- and trust-building as well as discerning each other's needs, they could have the added benefit of minimizing those dreaded requests for a full-time volunteer receptionist or file clerk from staff who just don't understand the volunteer dynamic.

Meetings with staff will enhance knowledge of the different departments and will, ultimately, help with matching and placement during the screening process. It's also a chance to market the volunteer program internally to staff who may not know the breadth of possibilities volunteer assistance may offer.

Sometimes, the job development process occurs in reverse. Volunteer candidates approach a program with specific interests, talents or experiences they want to use, but no existing volunteer job fits. With a network of staff contacts and a good working knowledge of the organization, a volunteer program manager can determine -- through talking with staff -- if there are unmet needs the candidate can fill.

In either scenario, a written job description or training checklist is a must in a well-run volunteer program. It will lay out the parameters of the work to be done and the expectations of the program and supervisor. It can serve as a marketing and screening tool, and because it spells out exactly what a volunteer should do in an assignment, it is a basis for supervision and evaluation.

Don't develop these tools in isolation. In a decentralized program, job descriptions must be developed primarily by the paid staff who train and supervise volunteers. They know the specifics of what they want done. The volunteer program manager should assist, ensuring the tasks and training are reasonable and cover all liability. In a centralized system, discussion with staff who will work with or near the volunteer and their feedback will be helpful.

Volunteer job descriptions should include these essential elements:

- Job title
- Supervisor's Title, department and description of department
- Purpose of the assignment and its connection to organization's mission
- Description of position
- Responsibilities/Duties of volunteer
- Qualifications (if any are required or desired)
- Training and other requirements, such as criminal background checks, confidentiality or health assessments
- Timeframe or Commitment
- Benefits

Some programs use a training checklist instead of a job description, which combines the position description with a checklist of all items in which the volunteer should be trained. When completed both the volunteer and the trainer sign the document and it is kept in the volunteer's personnel file. This allows the volunteer a clear conception of what the assignment entails and documents training. The volunteer can also sign and date a copy of the job description, stating they have understood its contents, and that can be placed in the volunteer's file.

*"I shall pass through this world but once. Any good, therefore, that I can do or any kindness that I can show to any human being, let me do it now. Let me not defer or neglect it, for I shall not pass this way again."*

*Mahatma Gandhi*

### **III. RECRUITMENT**

While the concept of recruitment is intimidating to many, it is simply finding people who want to do the volunteer jobs the agency needs done. It is not convincing people to volunteer in jobs that don't interest them. As with so many other aspects of volunteer management, matching jobs with people is the key element. Good recruitment means piquing the interest of potential volunteers by the possibility of a volunteer job that matches their interests and experiences.

Position design and descriptions, then, are a required prequel to recruitment. Knowing why volunteers are needed, how many and what type of person would be a good match, and, of course, ensuring the positions are interesting and meaningful, is essential. Otherwise, recruitment is ultimately doomed to failure.

Part of the strategic planning process for recruitment is knowing the agency and its perception in the community, learning what barriers there might be to volunteering with your agency and, conversely, why people might want to volunteer with your agency. For example, there might be much interest in the community for a program that tutors youth, but if the tutoring site is not near public transportation or in a dangerous neighborhood it will be more difficult to recruit volunteers. If the organization can eliminate these barriers by busing volunteers to the site, developing off-site work in a safer neighborhood or making other arrangements to ensure safety, recruitment would be easier.

Another area that can trip up volunteer program managers is over-recruitment. Finding too few volunteers to meet needs is undesirable, but too many can cause difficulties as well. While a waiting list can hold some community cachet, it can also affect your public image. Volunteers may wonder why you are asking for help when you don't have enough openings to accommodate them, and this can cause resentment. Targeted recruitment (described below) is the best strategy for a volunteer assignment with limited openings.

As in the rest of life, honesty is the best policy. In your recruitment materials and presentations, tell people exactly how many people you need, what the requirements, criteria and screening process are. Tell people what they will and will NOT be able to do as volunteers. If people come away from a recruitment presentation thinking they will be able to "counsel troubled youth," but in reality only licensed social workers do counseling, volunteers will be disappointed and angry with the false advertising. Those are volunteers who won't stick around.

Taking the time to design a recruitment campaign, then, is essential. Brainstorming the barriers and possibilities with staff, current volunteers and program staff, creating fulfilling jobs that are important to the organization, knowing staff's needs and understanding that you are not trying to convince someone to volunteer at your agency. You are giving people a gift: the chance to do something they really want to do.

There are two basic recruitment strategies: the targeted and non-targeted methods. Non-targeted recruitment is a mass appeal for any type of person who is available, and is generally most effective for jobs that require little skill, such as special events, house painting or park clean-up. Most volunteer programs need a more sophisticated approach that involves recruiting people who have a specific interest in the work of the agency and have the skills to perform a specific job needed by the agency. This is called targeted recruitment.

### Non-Targeted Recruitment

To design an effective non-targeted recruitment campaign, consider utilizing these recruitment methods:

- Most importantly, ask people to volunteer. Surveys show most people don't volunteer because no one asked them.
- Create your message.
- Place a newspaper ad.
- Do a public service announcement.
- Get media coverage of your volunteers or volunteer program.
- Post flyers with a general message to distribute at supermarkets, senior centers or schools.
- Put requests in church bulletins, company or organizational newsletters.
- Speak at community organizations or volunteer fairs.
- Contact college or university departments about internship programs.
- Utilize word-of-mouth with current volunteers, staff or board members.
- Register with any on-line volunteer databases, local volunteer centers, corporate volunteer councils, Junior League, Executive Service Corps or school community service programs.

### Targeted Recruitment

To design an effective targeted recruitment campaign, these are important questions to answer:

- Who might want to do the job and have the skills?
- What is their age and income range, sex, or personal situation?
- Where do they live, work, shop, play or socialize?
- Why would someone like this want to volunteer? Understanding motivation is key to developing an effective message. What message would reach your target audience? What is the best method for reaching them?
- How would such a person benefit from doing the job? What would be the most effective method of communication?
- What kind of message will inspire them? Why is this job important? What kind of impact can they make?

An example of a targeted recruitment campaign: A children's hospital planned to start an evening parenting program at a pediatric primary care clinic in a highly diverse, urban neighborhood. Parent participants would be from the neighborhood, and staff wanted volunteers to work with the children while their parents were in class.

After much discussion with staff on the type of volunteer needed, why people might volunteer in this program and the benefits that could be offered them, it was clear the volunteers should

reflect participants in diversity and have strong interests in children and parenting issues. Child development students at a city college in the clinic neighborhood were targeted. The student body was highly diverse and motivated. Many were non-traditional, older students who had jobs, children and school, so were quite busy. But they were interested in good field work and training. The program supervisors would have to ensure the volunteers received a good educational experience. That would be the perk or benefit.

The strategy included meeting with faculty in the child development department and recruiting from their classes. Professors were thrilled with the possibility of their students getting good training and “hands-on” experience with professionals. The recruitment talks emphasized the training and vocational benefits to the students, the location near the college and the idea of helping the neighborhood. Many students signed up for screening interviews and all volunteer spots were easily filled.

While this was a highly successful targeted recruitment campaign, don’t think the story ends there. Additional recruitment was needed for the next parenting class because some of the original volunteers had conflicts or graduated. For most programs, recruitment doesn’t end. Just when you think all positions are filled, someone may leave. Recruitment, then, is an ongoing creative endeavor of figuring out where and how to recruit the right people to match the need.

*“When you cease to make a contribution, you begin to die.”*

*Eleanor Roosevelt*

#### **IV. SCREENING/INTERVIEWING/PLACEMENT**

The screening of new volunteer applicants is, arguably, the most crucial area of volunteer management. Going from volunteer candidate to actual volunteer means becoming an integral link in your organization, who will interact with clients (many of whom are from vulnerable populations), and/or the public and most certainly paid staff.

Screening is multi-faceted and can include a variety of tools such as the application, criminal background check, reference checks, health assessment (required in many health care organizations) and interviews. Each agency will have its own requirements that the volunteer program manager creates and these may vary according to the type of organization or volunteer job to be filled.

Screening implies that we rid ourselves of the notion that a warm body, ANY warm body, can do any volunteer job that might be available. This may mean a complete change of mindset for some. In practice, it means that volunteer program managers must be willing to forgo the first volunteer who walks through the door if he or she isn't the right match for the job or the agency. Sometimes it means turning people away or redirecting them to other positions or agencies, which may be better-suited for their particular skill or interest.

Screening generally begins at the first point of contact with an individual. Often this is on the phone when a potential candidate calls to inquire about volunteering with the agency. Phone screening can be particularly effective in redirecting those who can't meet the basic program or volunteer job requirements and it can also give an excellent first impression of the candidate. From there the decision is made whether to move on to the next step, be that scheduling an individual interview, screening orientation, or simply sending out additional information.

The interviewer, be they volunteer program manager or director, is the firewall between the outside world and the internal world of clients, patients or the public. It is the interviewer's responsibility to ensure that those people coming into the agency as volunteers are a good fit with the organization, and that they are well-matched with a suitable volunteer job that meets their interests and experiences as well as the agency's needs. If candidates are not a fit with the organization and the job, innumerable difficulties may arise, not the least of which could be retention problems among the volunteer corps. A legally sound but probing interview and appropriate background checks can bring your agency's incident rate down to zero, reduce recruiting by increasing retention and produce a truly effective volunteer staff.

The purpose of the interview is to get to know the volunteer candidate and their motivations for coming to your organization. Knowing the volunteer's real motives will help you make the right match for them with your agency or redirect them to an organization more appropriate to their interests.

Some elements of a good interview include:

- Establishing rapport with the candidate. If you can quickly make the candidate feel comfortable and at ease they may be more likely to tell you all you want to know.

- Listening carefully. One of the most common mistakes novice interviewers make is to talk too much -- about the agency, the volunteer program or job, even themselves. Make sure you listen more than you talk. And don't worry about those awkward silences; the candidate always fills them with useful information.
- Asking open-ended questions that will give you specific information about past experiences and future needs, such as those below. These questions could lead the interviewee to reveal information about work, college, friends, or family that can't be asked about directly:
  - Why did you decide to call us?
  - What interests you about volunteering with us?
  - What experience do you have (with this population, in this setting, etc)?
  - Have you volunteered before? Where and what was the experience like?
- Watch for red flags. Every agency's red flags are different, but many worry about boundary issues, unrealistic expectations, lack of real commitment or interest.
- Try to determine the candidate's motivations and real interest in volunteering with you. Are they resolving their own issues, looking for affiliation with your organization, interested in vocational experience? The well-phrased question can unlock all these answers.
- Gain a sense of the candidate's temperament. This is crucial in determining the match.

Find out what kind of training the applicant might need to perform available jobs.

Determine capabilities of the candidate (physically or emotionally), particularly if the volunteer will be working with a vulnerable population.

- Make sure the volunteer understands the requirements and limitations of the job.
- Evaluate special needs the volunteer applicant may have regarding such issues as disabilities, childcare, a time of the year or day he or she can't work, so that both of you have clear expectations.
- Talk about potential matches for the volunteer.

By the end of the interview, a clear picture of the candidate and their suitability for the agency should have emerged. If not, invite them back for a second interview. Do not accept anyone unless you feel comfortable. Remember, volunteers will have access to your organization, your clients and the public you serve.

Even if the interview was great, there are several elements of screening to complete. Second interviews with supervisors are often utilized as a screening tool. Criminal background checks, reference checks and, in some instances, health assessments are crucial. These can lower an agency's risk substantially and give the supervisor and volunteer program manager good information to make an educated decision regarding acceptance into the program .

*“If you want to lift yourself up, lift up someone else.”*  
*Booker T. Washington*

## **V. ORIENTATION/TRAINING**

Many volunteer programs opt to combine orientation and training because it is either more convenient or out of a misguided belief that they are one and the same thing. They are not. Orientation is general information about the organization, which includes the vision and mission of the agency and volunteer program, legal and liability issues, important policies and procedures.

Training, on the other hand, is specific to the job of the volunteer. It includes details about what the volunteer is to do when working in the position, from how to talk with clients to how to clean up after an activity as well as information about the subject area. So while there may be training items that cross over from one job to the next, each position must have a separate and distinct training. Orientation, on the other hand, should be general enough to apply to all jobs.

So, just as new staff go to a new employee orientation when they start a job, then get specific training from their departments, so too should volunteers attend a general orientation, then a specific training. This training and orientation can serve not only to prepare the volunteer for their role, but also to speak more eloquently about their experience and how it fits into the overall mission of the agency.

Generally, in a decentralized system, the trainer is the staff person who supervises the volunteers, while in a centralized system, the volunteer coordinator might plan and do most of the actual training. Many programs have some kind of combined system in which each takes a part.

An orientation, which usually is done by the volunteer department staff, should include:

- Vision and mission of the agency and the volunteer program
- Policies and procedures, which the volunteer must agree to. These could include, among others:
  - ✓ Sign-in
  - ✓ Attendance
  - ✓ Visitors
  - ✓ Emergency Procedures
  - ✓ Recognition
  - ✓ Dress code
  - ✓ Confidentiality
  - ✓ Termination
- Safety Issues

Legal and liability issues

Tour of the volunteer office space, where to hang coat, etc.

In training, the volunteer should:

- Learn how their work impacts the clients, vision and mission of the agency

Learn about the population served, whether developmentally delayed seniors or attendees at an art museum.

- Learn about roles. Go over each section of the job description.
- Learn important information about the subject area. For example, if volunteers are working with developmentally delayed seniors they should learn about developmental disabilities and aging.
- Meet with relevant staff and learn about the volunteer's role with staff. To whom does the volunteer report? What department are they in? What are their expectations?
- Tour the volunteer's work area.
- Discuss all procedures, from recording hours to total time commitment, punctuality, absences and attendance policy.

Sometimes training is quite extensive and occurs over a long period of time. Sometimes all material can be covered in one session. Besides didactic methods, training can also include observational sessions or shadowing programs, in which a new volunteer follows a more experienced volunteer, for one or more work shifts.

It is excellent practice to document orientation and training. Have trainers prepare a standard checklist for orientation and one for the specific job assignment. When complete, staff and volunteers can sign the checklists. These would go in the volunteer's file. If performance becomes an issue or policies are violated, documentation exists that the volunteer was oriented and trained.

Just as training and orientation really begin at the point of interview, when the coordinator can listen to the candidates' interests and needs and start telling them about the organization and available volunteer jobs, it doesn't end when the training session(s) are over. Good supervision is also a form of training with ongoing information passed to the volunteer that is specific to their experience.

*“Learn to lead in a nourishing manner. Learn to lead without being possessive. Learn to be helpful without taking the credit. Learn to lead without coercion.”*  
*Lao Tzu, philosopher*

## **VI. SUPERVISION**

All volunteers need effective supervision. The supervisor's role is to prepare volunteers to do their job and support them when they do it. Supervisors can guide volunteers, quickly nixing inappropriate behavior while encouraging work that is clearly beneficial. But as anybody who works in a paid position knows, a good supervisor is rare. And volunteer supervisors have an additional challenge. They must understand the special nature of volunteers' motivation, which can differ substantially from paid employees', in order to meet their needs and, hopefully, retain them.

Good supervision takes time. Too often in our agencies and organizations, we bring on volunteers (or even staff) without sufficient training or orientation, throw them into their jobs and walk away. With volunteers, this rarely works.

Think of volunteers as unpaid staff who need to know much of what employees know (depending on their position), but work only one day a week or several hours a month. Think how long it takes staff, working 40 hours a week, to become truly acclimated to a work environment and the challenges volunteers face come into focus. For volunteers, who usually work many fewer hours than a full-time employee, it can take months to become fully integrated and comfortable with the work, the staff and the surroundings.

Volunteers need supervisors who will ease that transition for them, who will take time with them after training, who will encourage questions. Volunteers often feel uncomfortable asking questions if staff is busy.

Frequent feedback conversations are important for ongoing supervision. These sessions may be as simple as a question, “How did it go?” and the volunteer's reply, “great.” Or they can be as complex as a sit-down debriefing in which the volunteer relates intense interactions that occurred during the shift. In either case, they present perfect opportunities for coaching and relationship-building. They also give the supervisor a chance to informally recognize excellent work.

While time is the scarcest commodity for most of us, time invested upfront will pay off when volunteers feel connected to the agency and their supervisor, are effectively doing needed work and are committed to staying with the organization.

Some important elements of supervision include:

- The ability to establish a trusting, positive relationship with volunteers.  
This means that the supervisor has done enough training and observation to have faith and confidence in the volunteer's work.

- The ability to confront issues in a congenial, non-threatening way. In every supervisory experience, there comes a time when uncomfortable issues arise. Maybe the volunteer does not come to work on time, maybe their interactions with clients are a bit off.
  - ✓ Supervisors must be able to sit down and speak with volunteers, even if it is difficult. In those meetings, use specific examples of behavior, feel comfortable criticizing constructively and make sure to have the best interest of the volunteer and client at heart. It will show.
  - ✓ Volunteers want to know their work is important and that they will be held accountable for their actions.
- Fostering open communication.
 

If they don't hear from their supervisors, volunteers will constantly wonder if they are doing the "right" thing.

Feedback at the end of most shifts can elicit open communication and, with good listening skills, the supervisor can gain insight into the nature of the volunteer's interactions.
- Recognition and appreciation of a job well done.
  - ✓ Just as volunteer program managers must be able to confront issues, they also must be free with praise, recognition and appreciation.
  - ✓ The easiest and, often, most appreciated recognition is a simple "thank you" for a specific action. It can help volunteers feel "seen," that they are not working in a void.

Utilizing volunteers' special talents. This makes them feel useful and special.

- ✓ Most volunteers will come with an interest area, but many will have special talents and abilities. Not all of these are professional skills, but may be as simple as having a special knack for rocking a baby to sleep or organizing a large group for a park clean-up.
  - ✓ By getting to know the volunteers and taking a personal interest in them as people, volunteer program managers can bring out skills and talents that will benefit the agency.
- Empowering volunteers to do their work.
 

No one likes to be micro-managed and volunteers are no different. Train them well. Plan ongoing feedback, recognize their work and let them go.

They will not do the work the way you would. They will have their own style. But if it's productive and appropriate, who cares?

It's difficult to relinquish control, especially when the supervisor is responsible for the work. But that is the great challenge of the supervisor: to be ego-less, not threatened, and to push people forward into the limelight.

*“Everyone can be great because anyone can serve. You don’t have to have a college degree to serve. You don’t even have to make your subject and verb agree to serve... You only need a heart full of grace. A soul generated by love.”*

*Martin Luther King, Jr.*

## **VII. EVALUATION**

Volunteers want to know that the work they do is important and meaningful to the agency. They need validation if they are doing a great job. They need to know about potential performance improvements. They need the chance to hear their supervisor’s formal assessment and evaluate themselves or the program. This says to them that their work is important enough to evaluate. Supervisors, meanwhile, can use the evaluation session to continue to shape behavior, and volunteers can continue to improve their performances.

The agency, too, stands to benefit from regular assessment by volunteers who are, by definition, both internal to the agency and external. A self- or program evaluation, included in the process, will give supervisors and other agency staff the opportunity to see how they are perceived by volunteers, how the program seems to be working and if the volunteers feel well-trained and comfortable in their roles. It gives staff a chance to revisit their orientation and training content and supervisory technique.

The annual evaluation should not replace feedback sessions that focus on specific incidents during the week or month. Nor should it be a punitive process. If there has been effective supervision and open communication, there should be no surprises for either the volunteer or the supervisor during the evaluation.

Volunteers should be apprised of the evaluation process during orientation and training. The person who is most familiar with the volunteer’s work should conduct the evaluation. Most likely that person will be the supervisor. In a decentralized system, the volunteer program manager is not the supervisor. So if there are specific improvement issues to discuss during the evaluation meeting, staff supervisors should meet with the volunteer program staff first to discuss the evaluation meeting.

It is easiest to use an evaluation format that covers a variety of areas and is general enough to apply to many volunteer jobs with room for comments on specific skill areas. Evaluation topics should relate directly to the position description since it is the basis of a fair performance evaluation. It is a good idea to have a mechanism in place for obtaining comments or feedback from staff other than the supervisor who work with the volunteer.

Create a simple evaluation form. Sometimes a checklist with room for comments is easiest. Topics should cover the volunteer’s skill at doing the job and accomplishments within the job. A numerical ranking isn’t even necessary. Some evaluations simply allow answers of “performs satisfactorily” or “needs more training.”

Include questions on:

- Quality of Work
    - ✓ Thoroughness in fulfilling duties
    - ✓ Timely completion of assigned tasks
- Able to determine when to identify, refer and/or solve problems  
Interactions with clients, patients or the public

Attitude

- Flexibility
- Dependability
- ✓ Attendance

Communication

- ✓ With staff
- With clients
- ✓ With supervisor

Just as you would for a staff performance evaluation, it is best to start the evaluation conversation by listening to the volunteer's thoughts on their experience and performance over the previous year. Don't get defensive. Non-judgmental listening will give the supervisor valuable information on the volunteer's perceptions, which can benefit future program development.

When the volunteer is finished, the supervisor has a chance to discuss performance. Beginning with negative comments is ill-advised. Even volunteers with improvement areas usually do some things well. Try to find the positive and emphasize it. Then move on to problem behaviors. Most supervisors dread this discussion, and it can be difficult. But it is easier if supervisors reframe the process to emphasize improving behavior, making the experience better for the volunteer, the supervisor and the client or public.

Supervisors should be direct with the volunteer, specific about the problem and expectations. Phrasing problems in terms of potential consequences to clients, the public image of the agency, team or staff can be helpful. Most volunteers care deeply about the agency and its mission, hoping to help not hurt the mission.

The job description, training checklist and orientation materials can also help in explaining expectations. Make sure volunteers know what kind of improvement is expected. While volunteer satisfaction is important, appropriate interactions with clients and/or the public is any staff member's primary responsibility. These appropriate interactions will be more enriching, ultimately, to the volunteer. Say to the volunteer, for example, "If you were to sit on the floor with the children to play with them, rather than on the couch, your experience here would be much more rewarding."

On the other hand, if supervisors listen first, put themselves in the volunteer's shoes and frame thoughts as discussion rather than ultimatum, some surprising things may emerge. Maybe the

volunteer doesn't really like the assignment, but has been too embarrassed to say it. A better match might solve the problem. Maybe the volunteer truly doesn't understand the expectations of the position or the repercussions of the actions. Maybe what they want to do as a volunteer with the agency is something that just isn't possible. All these revelations are positive and the supervisor, along with the volunteer, can decide how to change the situation or behavior.

The evaluation discussion should be documented, and both the supervisor and volunteer should sign the form. While the problem evaluation is challenging, with good screening, orientation, training and supervision, they are rare. Most volunteers are appropriate, committed workers who do a phenomenal job aiding the organization in ways paid staff just can't.

*"Our deeds determine us, as much as we determine our deeds."*  
*George Eliot*

## **VIII. RECOGNITION**

Volunteer program managers agonize over recognition. And well they might. While it takes work and creativity, recognition is the only paycheck volunteers receive, besides the satisfaction of their work, and it can motivate in many ways.

Good recognition is a matter of common sense and thoughtfulness. It is not a strategy for discharging obligations. Recognition also is not something that happens once a year. It's an ongoing, often daily, process of noticing what has been done and commenting on it in some way, saying thank you in appropriate ways that are meaningful to the volunteer.

There are two types of recognition: formal and informal. Informal recognition often consists of a simple "thank you." Seems pretty easy, but with busy staff who may be unschooled in essential volunteer management, it can be a rare occurrence. Thanking volunteers is much more effective when it's specific to a particular job done that day and informs the volunteer of the results of his/her work. For example, "Thank you for the work you did with Joey today. His math skills should really improve as you continue your tutoring."

Informal recognition can also include writing a personal note to the volunteer about a job well done, writing a recommendation letter for a salaried job or training the volunteer for promotion, which makes them feel validated and appreciated.

Some additional ideas for informal recognition include:

- Challenging your volunteers with meaningful work
- Recognizing their personal needs and accommodating them when possible
- Smiling and being pleasant
- Sending a birthday card
- Greeting them by name
- Training and orienting well
- Giving additional responsibility if growing out of job
- Allowing input in planning
- Enlisting them to train volunteers

Formal recognition is generally done for all volunteers equally, on a regularly scheduled basis. Some agencies recognize their volunteers based on anniversary, some on hours. Some give a formal banquet, others distribute pins or plaques. Whatever is decided at your agency, you should ask yourself: Why are we doing this? Is this something all the volunteers will really like and appreciate? Who should be recognizing the volunteers? Are we really organizing this for ourselves or is it truly for the volunteers and their supervisors?

Continually evaluate and reevaluate recognition events. At one agency, a typical, off-site banquet was the annual recognition event for years. While the music and food were always good, only a fraction of the volunteers ever went and those were always the longest-term or most involved.

Supervisors in this decentralized system were not invited even though they had the greatest daily contact with the volunteers.

One year, the volunteer department staff sat down and asked themselves the questions above. They realized that recognizing supervisors was crucial and they wanted more volunteers to attend recognition events. They opted for a week-long, on-site celebration that brought supervisors and volunteers together for lunch (served by volunteer department staff) on the day they came in to volunteer. It promoted the relationship between the volunteer and the supervisor. It was more work for the volunteer department staff, but actually less expensive, higher profile internally and reached 100 percent of the volunteers.

Here are some ideas for formal recognition:

- Give a pin, plaque or certificate to commemorate the anniversary or number of hours given.
- Plan a banquet, luncheon or party on- or off-site
- Nominate volunteers for service awards, such as Illinois' Points of Light Awards
- Include volunteers in media interviews
- Plan special celebrations for benchmark anniversaries (5, 10, 15 years)
- Have volunteers included in employee recognition events

*“I don’t know what your destiny will be, but the one thing I know; the only ones among you who will really be happy are those who will have sought and found how to serve.”*  
*Albert Schweitzer*

## **IX. RETENTION**

To retain volunteers, ensure they are satisfied with their experience. If their motivation and interest in volunteering are met by the assignment, supervisor and organization, volunteers will remain with the agency unless life circumstances force them to make a change.

Each volunteer, though, will have a different set of needs, a different reason why they volunteer, and different motivation. So the most important element in developing satisfied volunteers is creating a good match for them with a job that meets their interests and needs. The interview process is the point when volunteer program managers must probe to understand why the candidate wants to volunteer. And from this information, the manager will know whether the agency has a job that is a good match.

Effective supervision and sincere recognition are other key elements in retaining volunteers. If these pieces are in place, the volunteer will be doing what they want to do with a supervisor who understands and appreciates them. It will eliminate the common volunteer complaint that they rarely see their supervisors or they don’t have enough to do.

Many volunteers also need to feel a sense of the whole, that how they are spending their time connects to the overall mission of the agency is affecting the client, even the world. Many young working people who volunteer are looking for fulfillment above and beyond what they get from their paying job in the business world. Others want vocational experience. Still others need basic interaction in their lives and are motivated by a desire to affiliate or belong to a place or group of people

According to a research study published in the Journal of Volunteer Administration, and cited by Rick Lynch and Steve McCurley in their book “Volunteer Management,” the top 20 factors that are important to volunteers are:

- Helping others
- Clearly defined responsibilities
- Interesting work
- Competence of supervisor
- Supervisor guidance
- Seeing results of my work
- Working with a respected community organization
- Reasonable work schedule
- Doing the things I do best
- Suitable workload
- Freedom to decide how to get work done
- Chance to make friends
- Pleasant physical surroundings

- Opportunity to develop special skills/abilities
- Challenging problems to solve
- Convenient travel to and from volunteer work
- Opportunity to work with professional staff
- Volunteer recognition
- Adequate reimbursement of out-of-pocket expenses.
- Chance to move to paid employment.

Of course, with the mobile nature of our society, the increasing interest in short-term volunteering, high school community service requirements and corporate group volunteering, retention isn't always possible or even desirable.

Sometimes the people who want to stay are really the people who should leave -- those people who continue to volunteer out of habit rather than desire, are unwilling to improve or update their job performance, or who are overly invested in the program or clients and cross boundaries or upset the balance between helping others and helping themselves.

Striving for retention won't benefit the program in these cases. Being comfortable letting people leave will.

For the most part, though, investing in retention is investing in program. It reduces recruitment, endless screening and retraining. And long-term volunteers often have a high investment in the organization's mission.

## **APPENDIX ONE**

In this appendix are a series of forms used by volunteer programs throughout the state. Most agencies are identified, but some preferred to keep their identity private. In those forms the name of the agency has been deleted.

Included are:

- Mission and purpose statements
- Inquiry form
- Self assessment form
- Applications
- Volunteer information sheet
- Memorandum of understanding
- Screening and recommendation form
- Position development form
- Job descriptions
- Training checklists
- Volunteer Manual
- Annual assessment
- Supervisor training checklist

## **APPENDIX TWO**

This resource list has been edited and adapted from the bibliography in Volunteer Management: Mobilizing All the Resources of the Community, (Downers Grove: Heritage Arts) 1996 by Steve McCurley and Rick Lynch. An extensive and comprehensive bibliography, compiled by McCurley over many years, can be found online at [www.energizeinc.com](http://www.energizeinc.com).

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